



Aldelo[®] Gift Card Server

User Manual

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Chapter 1

Requirements

The following requirements must be met before using the Aldelo® Gift Card Server software.

1. The headquarters location from which the Aldelo® Gift Card Server software operates must have an always on, dedicated, internet connection such as DSL, Frame Relay, T1, Cable, or other broadband Internet service.
2. Obtain a Static TCP/IP address from your Internet Service Provider (ISP). You must request this type of service from your ISP.
3. When using a firewall, allow access on a specific TCP/IP port so that your restaurant client connections may communicate with your Aldelo® Gift Card Server. Your network administrator usually chooses this port number. The default port number is 5021.
4. Use a standard baseline computer to run the Aldelo® Gift Card Server software. Minimum computer specifications may be found on the Aldelo website at www.aldelo.com. A faster CPU speed, more RAM, and a faster internet connection than dictated by the minimum requirements can help speed up your gift card processing.

Chapter 2

Installation

Install the Aldelo® Gift Card Server software on a network computer at your company's headquarters location. The installation is straightforward and consistent with other products from Aldelo Systems Inc.

To begin, make sure you have the latest version of the Aldelo software. Insert the Aldelo® For Restaurants Installation CD into the CD-ROM drive on the target computer. When the Aldelo® Product Installer screen appears, click the "Aldelo Gift Card Server – English Language Installer" option to begin the installation process (see Figure 2-1).



Figure 2-1

When the InstallShield Wizard screen displays, click the “Next” button (see Figure 2-2).

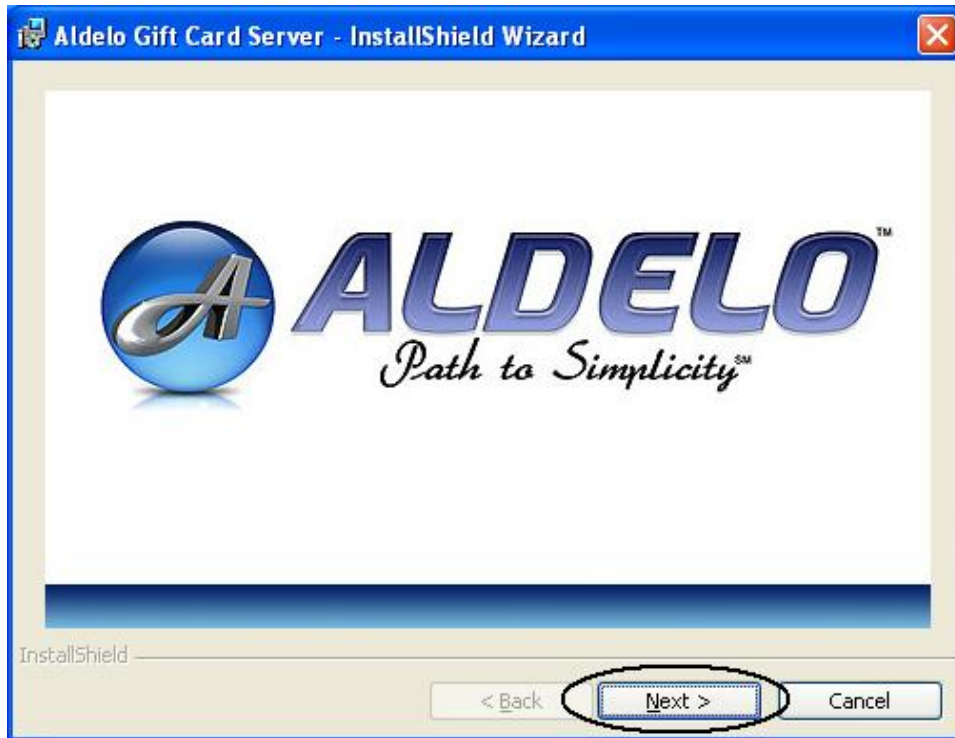


Figure 2-2

The Welcome screen follows the InstallShield Wizard screen. Click the “Next” button on this screen as well (see Figure 2-3).



Figure 2-3

The following screen displays the End-User License Agreement (“EULA”). Read the EULA carefully. Agreeing to the terms of the EULA creates a legal agreement between you and Aldelo Systems Inc. If you accept the terms of the agreement, click the “Next” button (see Figure 2-4). You must agree to the terms of the EULA or you cannot proceed with the installation.

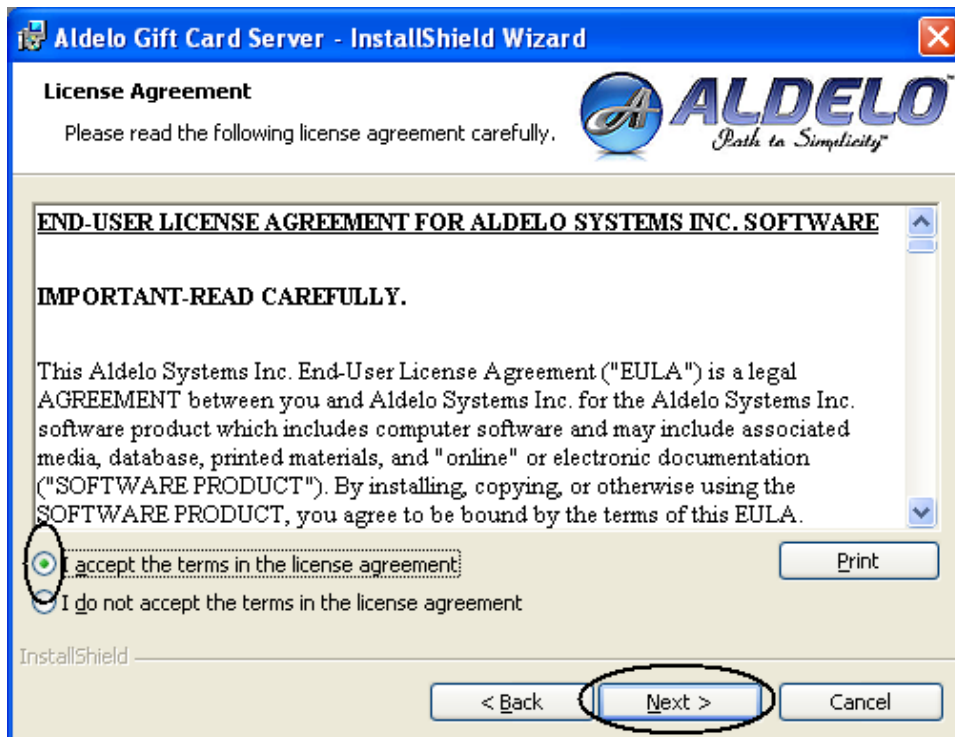


Figure 2-4

On the Customer Information screen, enter your User Name and Organization name. Select one of the installation options and click the “Next” button (see Figure 2-5).

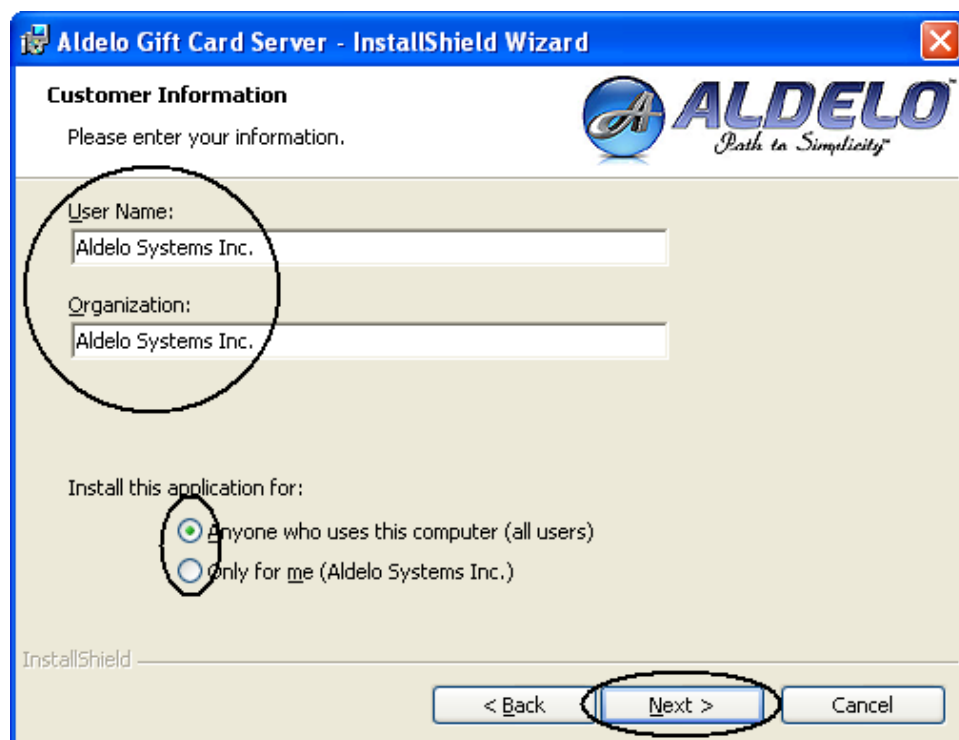


Figure 2-5

Select a destination folder for the installation on the following screen by clicking the “Change” button. To accept the default destination folder, simply click the “Next” button to proceed (see Figure 2-6).



Figure 2-6

Verify that all of the previously entered information is correct on the Ready to Install the Program screen, then click the “Install” button (see Figure 2-7).



Figure 2-7

If the installation is successful, the InstallShield Wizard Completed screen displays. Click the “Finish” button to complete the installation process (see Figure 2-8).



Figure 2-8

Chapter 3

Setup

Server Setup

Once you have installed the Aldelo® Gift Card Server, connect to the Aldelo® Gift Card Server database.

To connect to the Aldelo® Gift Card Server database, follow the steps below.

Click “Start” on the desktop. Navigate to “All Programs\Aldelo Gift Card Server\Aldelo Gift Card Server” and click on it (see Figure 3-1).

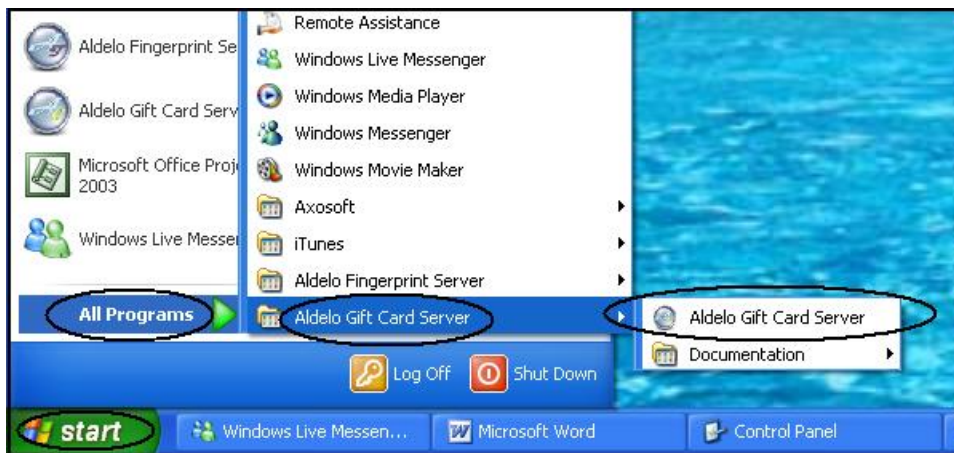


Figure 3-1

Click “OK” when the software prompts for the data source (See Figure 3-2).

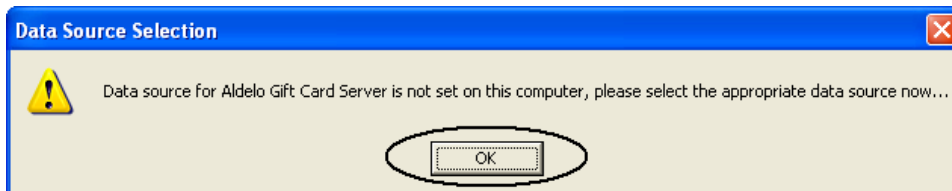


Figure 3-2

Navigate to [Local Disk]:\Program Files\Aldelo\Aldelo Gift Card Server (see Figure 3-3).

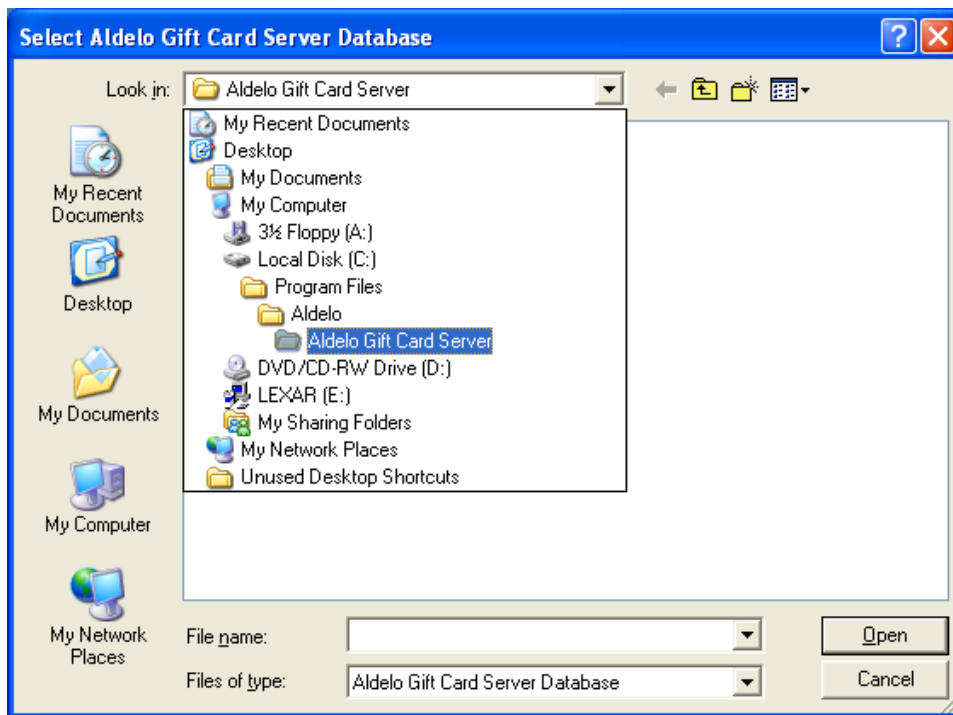


Figure 3-3

Right-click on the file “adGCS.mdb” (see Figure 3-4).

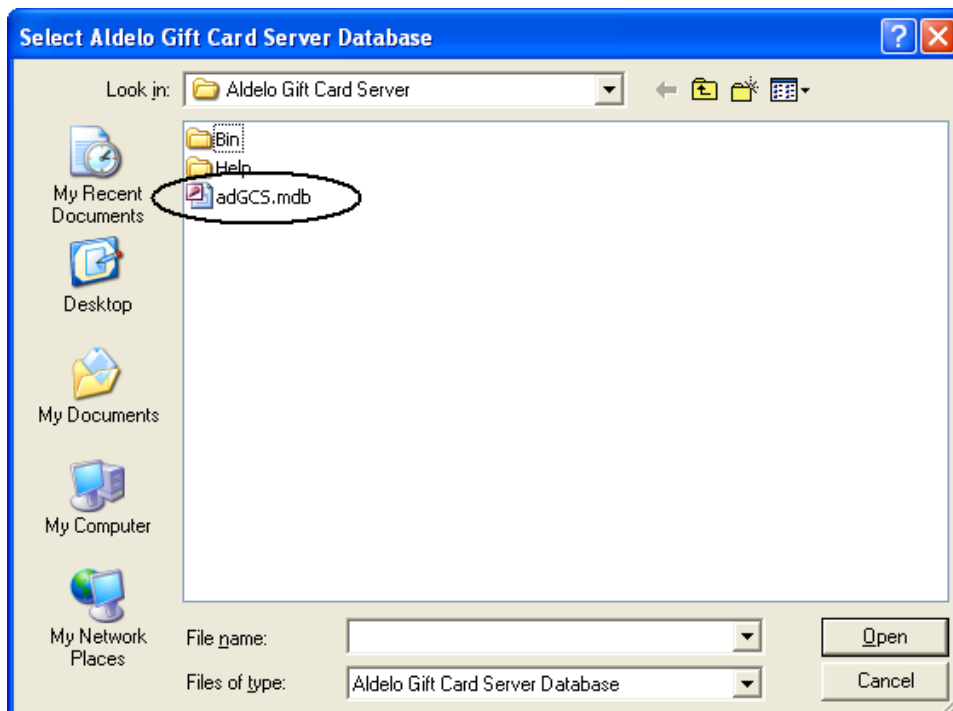


Figure 3-4

Click “Rename” and enter the name of your restaurant as the file name of the database but leave the “.mdb” extension portion of the file intact. The new name of the file should now be “yourrestaurantname.mdb.” Once you have successfully renamed the file, click the “Open” button (see Figure 3-5).

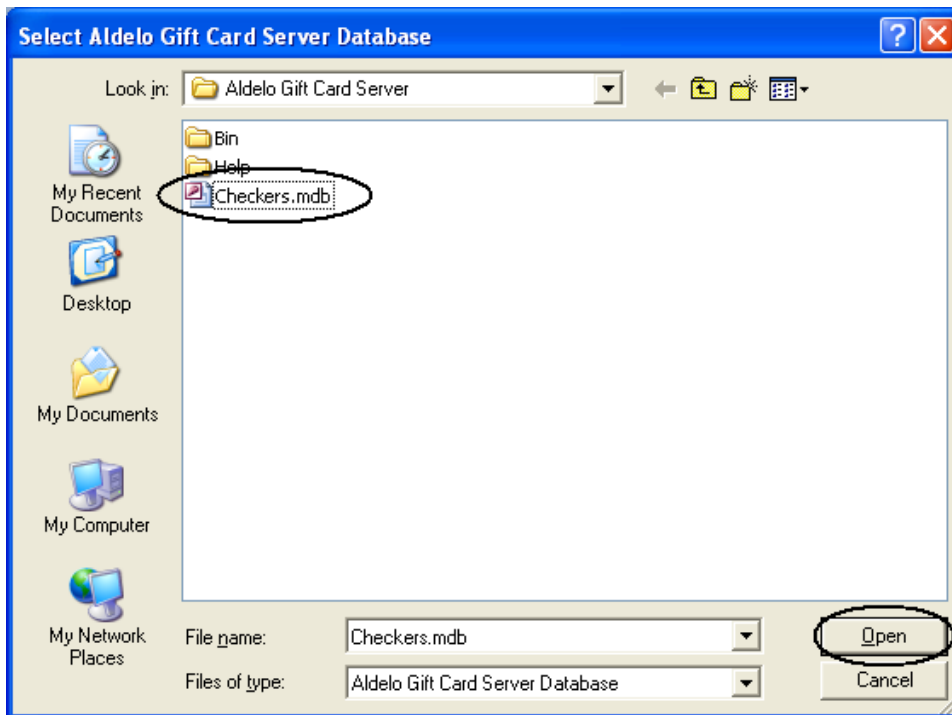


Figure 3-5

When the system comes up, the System Setup window displays. Leave the TCP/IP Address and TCP/IP Port at the default values (see Figure 3-6). You can change these later if you like.

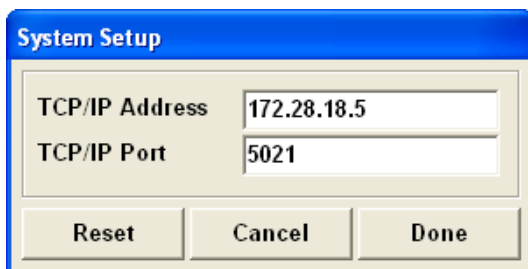


Figure 3-6

Restart the software.

The reason we change the database name is to protect the database from being overwritten if the software is upgraded or uninstalled.

Aldelo® For Restaurants Setup

Each client location must connect to the Aldelo® Gift Card Server. Several settings on the client machine must be changed.

The basics of the setup are to transfer or “forward” any communications coming into the router on the GCS Server port to the IP address of the machine where the Aldelo® Gift Card Server is located (see Figure 3-7).

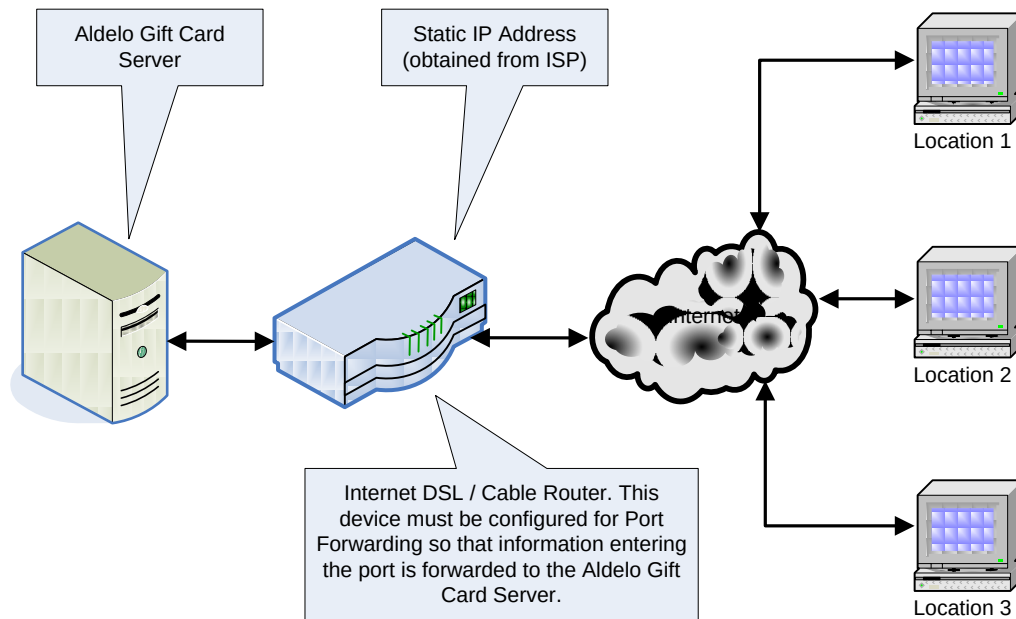


Figure 3-7

To connect each client to the Aldelo® Gift Card Server, follow the steps below. These steps assume you are in the Back Office of Aldelo® For Restaurants on the client machine. You must perform these steps at each client location.

Click on “Store Settings” (see Figure 3-8).

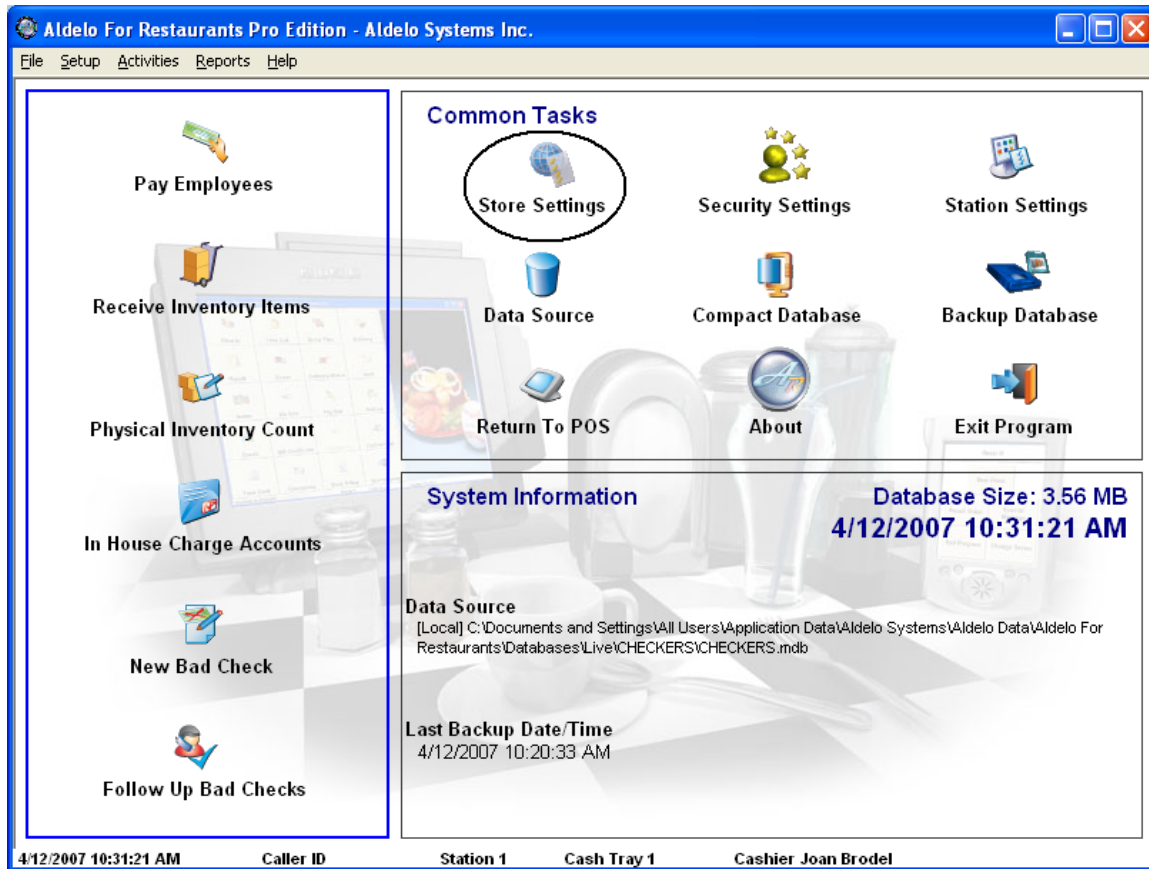


Figure 3-8

Click on the “Staff/CRM” tab (see Figure 3-9).

The screenshot shows the 'Store Settings' dialog box with the 'Staff / CRM' tab selected. The dialog has a blue title bar and a tabbed interface. The 'Staff / CRM' tab is highlighted with a red circle. The 'General' sub-tab is active, showing various fields for store information. The 'Data Source' button is highlighted in the bottom left corner.

Store Settings				
Print	Staff / CRM	Products	Order Entry	Other
General	Taxes	Services	Revenue	Receipts
Store Name	Aldelo Systems Inc.		Server Computer Name	
Premise Address	4641 Spyres Way Suite 4		Server TCP/IP Address	
Premise Postal Code	95356	Modesto, CA	Server TCP/IP Port #	
Area Code + Phone No.	(209) 338-5481		Auto Restart All Computers	☐
			Auto Shut Down All Computers	☐
Default Area Code	209	Site Number	Auto Trigger Time	
Mailing Address	4641 Spyres Way, Suite 4		Display Special Message During Login	☐
Mailing Postal Code	95356	Modesto, CA	Special Message	
Side Bar Logo		...		
Daily Start Time	3:00:00 AM			
Lunch Start Time	10:00:00 AM			
Dinner Start Time	4:00:00 PM			
Telephone Display Format	(000) 000-0000	10		

Data Source Save Cancel Done

Figure 3-9

Fill in the “GCS Site Number” field with the number for this location, for example, “0001” (see Figure 3-10). Each location must have a unique number assigned to it. **Do not** assign the same location number for two different locations.

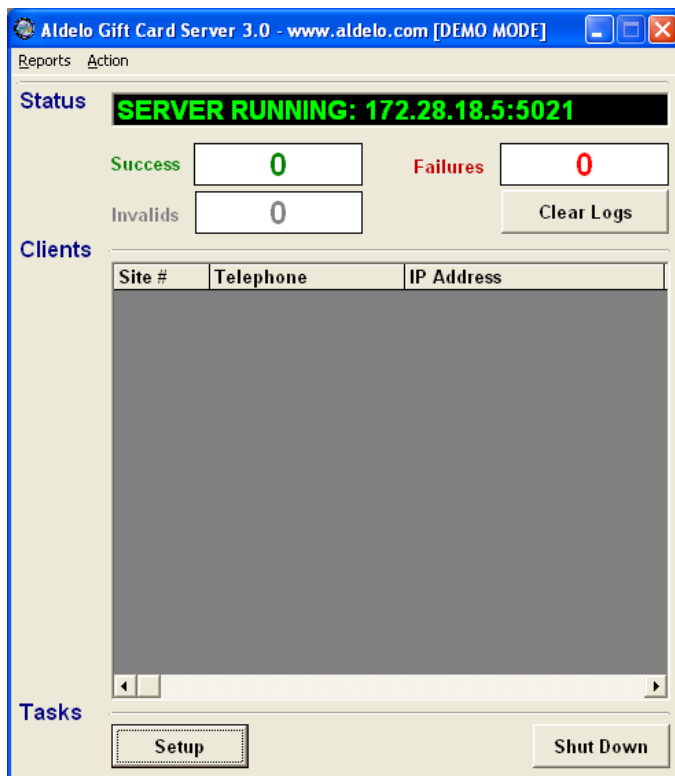
Next, fill in the “GCS Server IP” address (see Figure 3-10). This is the static IP address of the server computer that was obtained previously from your ISP.

Finally, fill in the “GCS Server Port” number (see Figure 3-10). This number can be found in the Aldelo® Gift Card Server software (see Figure 3-11). This is the number in green at the top of the screen. The port number is the portion after the colon (:). The default port number is 5021.

The screenshot shows the 'Store Settings' dialog box with the 'General' tab selected. The 'GCS Site Number' field is circled and contains '0001'. The 'GCS Server IP' field is circled and contains '172.28.18.5'. The 'GCS Server Port' field is circled and contains '5021'. Other fields include 'Pay Period' (Semi-Monthly), 'Work Week End Day' (Sunday), 'Over Time Basis' (By Work Week), 'Over Time After (Hours)' (40), and 'Over Time Hour %' (150). There are also checkboxes for 'Force Hourly Employee Clock In Before Use System', 'Employee with Multi Job Selection', 'Take Out / Delivery Show Search Type', 'Enforce Exact Telephone Number Digits', and 'Auto Create Freq. Diner Reward'. The bottom of the dialog has buttons for 'Data Source', 'Save', 'Cancel', and 'Done'.

General		Taxes	Services	Revenue	Receipts
Print	Staff / CRM	Products	Order Entry	Other	
Pay Period		Semi-Monthly	Over Time Basis		By Work Week
Work Week End Day		Sunday	Over Time After (Hours)		40
Clock Out Reminder After (Minutes)			Over Time Hour %		150
☐ Force Hourly Employee Clock In Before Use System ☐ Employee with Multi Job Selection ☐ Take Out / Delivery Show Search Type ☒ Enforce Exact Telephone Number Digits ☐ Auto Create Freq. Diner Reward					
Minimum Check			Freq Points Expire Days		
Tracking Begin Time			Minimum Checks Count		
Tracking End Time			Minimum Checks Total		
			Reward Credit Amount		
GCS Site Number		0001	GCS Server IP		172.28.18.5
			GCS Server Port		5021
Data Source		Save	Cancel		Done

Figure 3-10

**Figure 3-11**

Click the “Done” button when finished. The client locations now appear in the list of clients in the Aldelo® Gift Card Server software. The list shows the Site#, Telephone number, and IP Address of each connected location (see Figure 3-12).

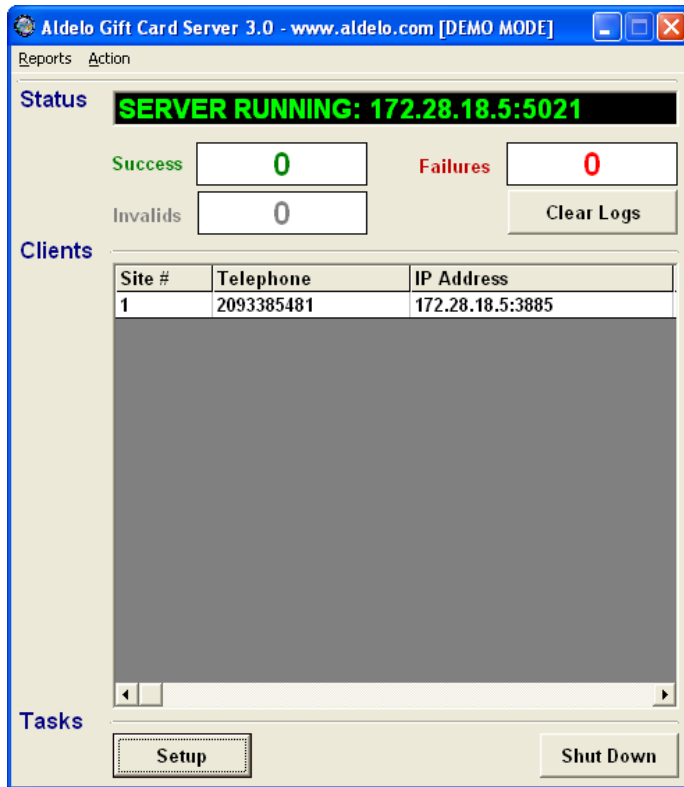


Figure 3-12

If a client fails to appear in the list, there may be a firewall between the client location and the Aldelo® Gift Card Server. The most common issue with clients not connecting is that port forwarding has not been setup properly on the device that connects the Aldelo® Gift Card Server location to the internet. This device can be the DSL/Cable modem or router provided by your ISP or one purchased at your local computer store. You may need help configuring this. Refer to the documentation that came with the router for instructions on how to set this up.

Chapter 4

Operation

Headquarters Operations

The GCS software allows your clients (your remote restaurant locations) to connect to it for validating, redeeming, and issuing of centrally stored gift certificates. This allows you to sell, redeem, and track your gift certificates at any one of your remote restaurant locations.

At the top of the Aldelo® Gift Card Server software is a menu bar with two menu items: Reports and Action.

Reports Menu

Under the Reports menu item, there are four sub-menu items: Outstanding Gift Card List, Gift Card Redemptions Details, Gift Card Issued & Redeemed Summary, and Gift Card Reconciliation (see Figure 4-1).

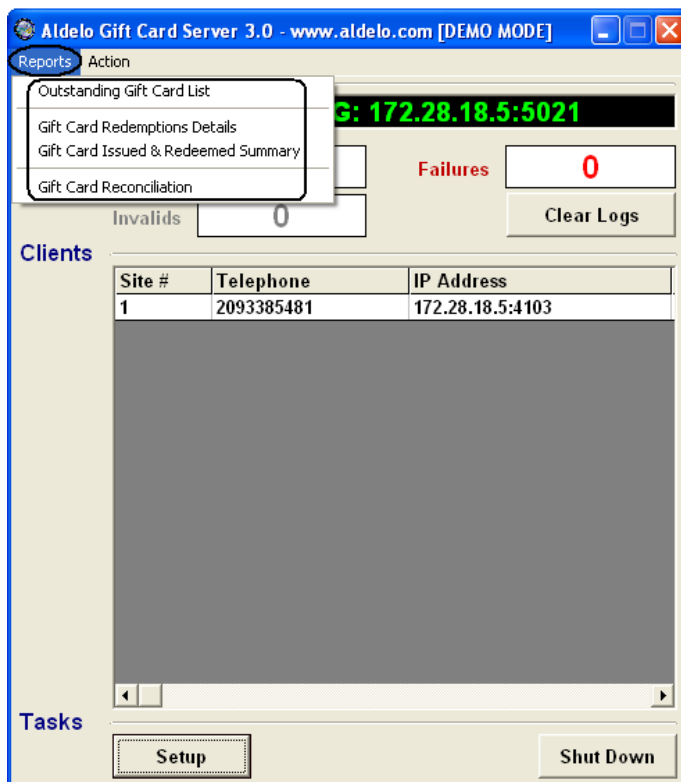


Figure 4-1

The Outstanding Gift Card List Report displays vital information about which gift certificates are still outstanding and their current redeemable balances (see Figure 4-2).

OUTSTANDING GIFT CARD LIST REPORT						
						Close
*** OUTSTANDING GIFT CARD LIST ***						
Date/Time	CERT. #	AUTH. BY	FACE VALUE	BALANCE	ISSUED TO	PRESENTED BY
4/12/2007 3:53:53 PM	00018	Dave Ventura	\$50.00	\$50.00	.	.
4/10/2007 9:52:38 AM	00017	Dave Ventura	\$100.00	\$69.04	.	.
2/15/2007 10:27:38 AM	00011	Dave Ventura	\$136.16	\$136.16	Paul Gentry	Jim Newman

Figure 4-2

The Gift Card Redemptions Details Report displays information about the redemption activities on certain gift certificates for a given date range (see Figure 4-3).

GIFT CARD REDEMPTION REPORT

Report From

Report To

4/12/2007

4/12/2007

Close

*** GIFT CARD REDEMPTIONS ***
FROM 4/12/2007 TO 4/12/2007

DATE/TIME	CERT. #	ORDER #	SITE #	CASHIER NAME	EMPLOYEE NAME	AMOUNT REDEEMED
4/12/2007 3:55:34 PM	00017	88	1	Joan Brodel	Eleanor Powell	\$30.96
4/12/2007 4:04:00 PM	00018	89	1	Joan Brodel	Joan Brodel	\$28.51
TOTAL REDEEMED:						\$59.47

Figure 4-3

The Gift Card Issued & Redeemed Summary Report is a breakdown of each site's total issued and total redeemed gift cards for a given date range (see Figure 4-4).

GIFT CARD ISSUED & REDEEMED SUMMARY REPORT		
Report From	Report To	Close
4/12/2007	4/12/2007	
*** GIFT CARDS ISSUED & REDEEMED SUMMARY PER SITE ***		
From 4/12/2007 To 4/12/2007		
Site Number	Total Issued	Total Redeemed
1	50.00	59.47

Figure 4-4

The Gift Card Reconciliation Report gives a breakdown of each site's activity for a given date range. It allows the headquarters to bill each site for the amount owed to other sites (see Figure 4-5).

Redeemed at Site #	Redeemed Total
Local Site	59.47
Total at Local Site:	\$59.47
Total from Remote Sites:	\$0.00

Figure 4-5

Action Menu

Under the Action menu item, there is only one option: Void Gift Certificate. Use Void Gift Certificate to void an outstanding gift certificate when you enter the Certificate number in the textbox and click the “OK” button (see Figure 4-6).

Figure 4-6

When the transaction finishes, the Void Complete window displays (see Figure 4-7).

Figure 4-7

Status

Below the menu bar is a TCP/IP status box that indicates whether or not this server is currently running. When the Aldelo® Gift Card Server software is running, the status message says “SERVER RUNNING” in green, followed by the IP address and port number that is currently configured (see Figure 4-8).

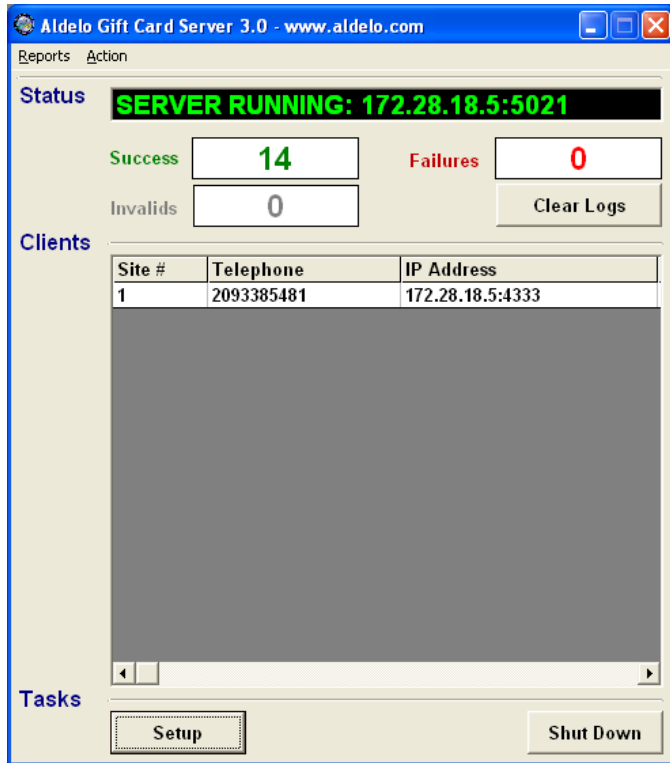


Figure 4-8

When the Aldelo® Gift Card Server software is not running, the status message says “SERVER NOT RUNNING” in red (see Figure 4-9).

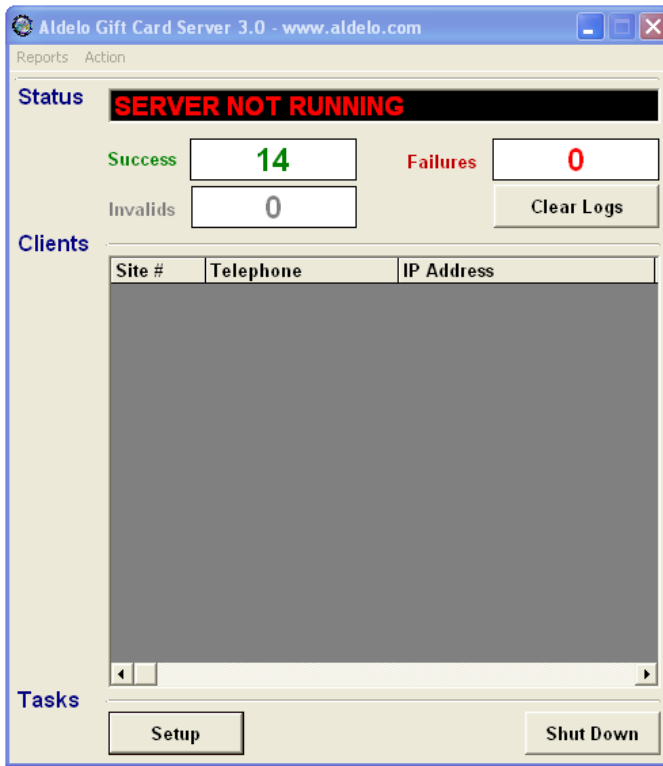


Figure 4-9

Following the TCP/IP status box are three status fields and a “Clear Logs” button. The three status fields show the total cumulative Success, Failures, and Invalid requests. The Invalids counter indicates the number of requests that were received in an incorrect format. The “Clear Logs” button allows you to clear these status fields to start over.

Clients

The Clients field lists all client locations currently connected to the server. The list includes the site number, the telephone number, and the IP address and port number of the connected location (see Figure 4-8, previous page).

Store Operations

The procedures for creating new gift certificates and redeeming gift certificates are similar to those of creating and redeeming traditional in-store gift certificates. When the restaurant location is not connected to the GCS server, the user is notified that the gift certificate feature is not available when an attempt is made to access it.

Creating New Gift Certificates

To create a new gift certificate at one of your remote restaurant locations, click the “Gift Certificate” button on the main screen of Aldelo® For Restaurants (see figure 4-10).

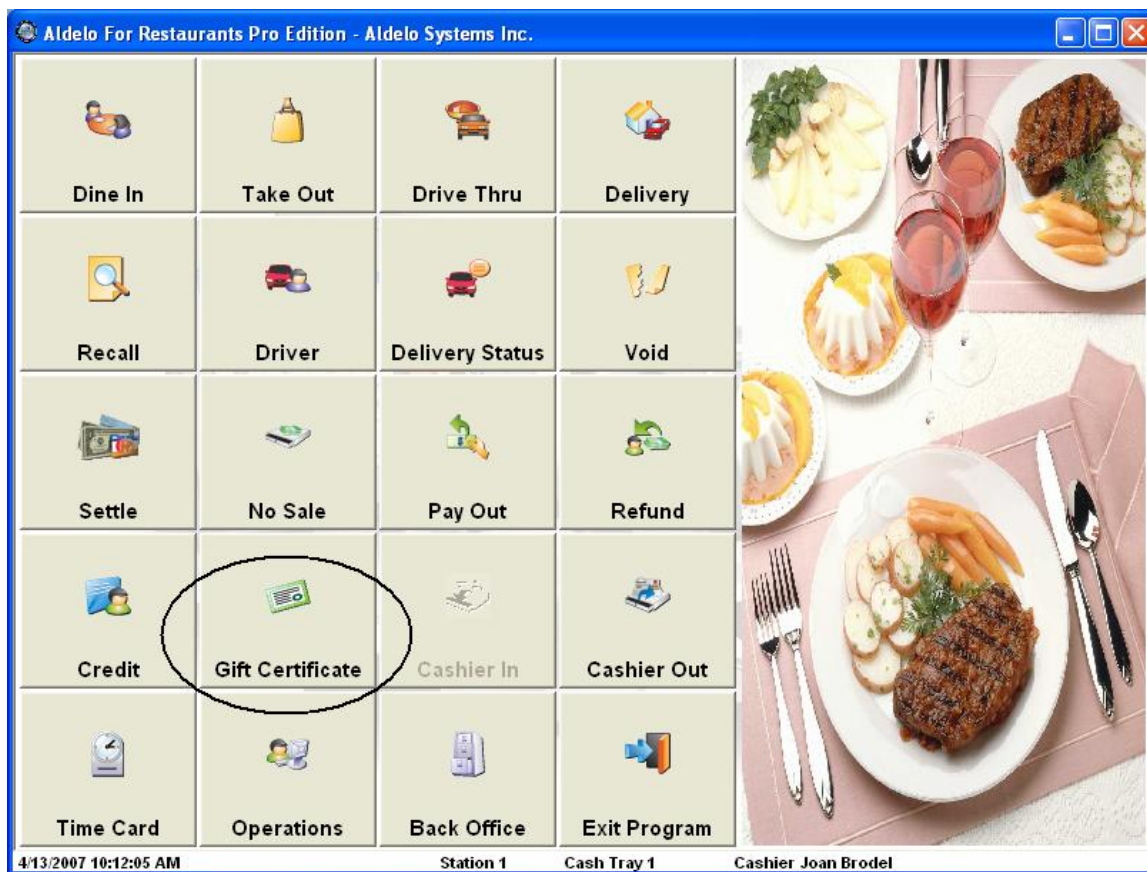


Figure 4-10

When the Aldelo® For Restaurants Gift Certificate screen displays, enter the requested information in the appropriate fields. If the location is using MSR (Magnetic Stripe Reader) cards, swipe the card through the reader to populate the MSR card number field automatically. If the location is using pre-printed sequentially numbered paper gift certificates, enter in this field the sequential number preceded by a semi-colon and succeeded by a question mark. For example, if the pre-printed Gift Certificate number is “147,” enter “;147?” in the MSR Card number field. The Expire Date, Issued To, Presented By, and Discount fields are all optional. Use the “Recharge” button to add additional value to an existing gift card. Use the “Add” button to create multiple gift cards when purchased by one customer. When all of the information is entered, select a payment type and enter the amount received from the customer. Click the “Finish” button to complete the transaction (see Figure 4-11).

Aldelo For Restaurants Pro Edition - Aldelo Systems Inc.

Gift Certificate

MSR Card: ** Expire Date: / Issued To: Dan Brown Presented By: Ron Brown

Total Amount: 150.00 Discount: 30.00 Balance: 120.00

Payment Information

Payment Type: Visa Amount Received: 120.00 Do Not Print Receipt

Buttons: Add, Recharge, Cancel, Finish

Keypad: Q, W, E, R, T, Y, U, I, O, P, Clear, 7, 8, 9, A, S, D, F, G, H, J, K, L, Back, 4, 5, 6, Z, X, C, V, B, N, M, , , Delete, 1, 2, 3, Upper Case, Move Down, Move Up, Home, End, 0, Enter

Status Bar: 4/13/2007 11:30:17 AM Station 1 Cash Tray 1 Cashier Joan Brodel

Figure 4-11

A Gift Certificate Receipt prints to your receipt printer. It includes all of the information for the transaction that was entered on the Gift Certificate screen as seen in Figure 4-11, above. It also includes an account number assigned to the transaction by the Gift Card Server software, for example “000115.” The first four digits indicate the GCS Site Number of the remote restaurant location, as was entered in the Back Office when the location was initially setup. The remaining digits represent a sequential number assigned to the Gift Certificate by the Gift Card Server software. In the example above, “0001” represents remote restaurant location one and “15” represents this as the fifteenth gift certificate issued by this location. Please note that the software always generates this number sequentially, regardless what number was entered in the MSR Card field on the Gift Certificate screen, so the numbers will not necessarily match. When using paper Gift Certificates, it is good practice to write this account number on the Gift Certificate in case the receipt is lost.

Redeeming Gift Certificates

When redeeming Gift Certificates in Aldelo® For Restaurants, select the “Gift Certificate” button as the tender type on the Settle Order screen (see Figure 4-12).

Settle Order - Ticket #: 8

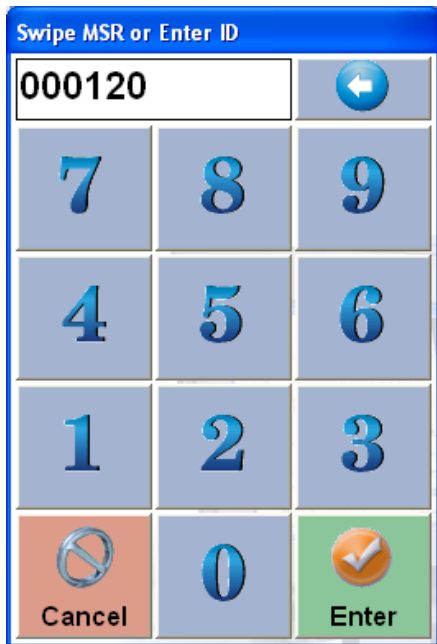
Cash	Check	Visa	Dine In	Dave Ventura
Mastercard	American Express	Discover	Order #	97
Carte Blanche	Diner's Club	ATM / Debit Card	Gratuity	0.00
House Account	Gift Certificate	Complimentary	Total Due	\$40.96
Even Amount Split			Total Received	0.00
			Balance	40.96

Discount Gratuity

Print Done

Figure 4-12

Swipe the MSR Gift Card or enter the Gift Certificate account number that was issued to the transaction at the time of purchase (see Figure 4-13).



The image shows a software interface titled "Swipe MSR or Enter ID". It features a text input field at the top containing the number "000120". To the right of this field is a blue circular button with a white left-pointing arrow. Below the text field is a numeric keypad arranged in a 4x3 grid. The first three rows contain digits 7-9, 4-6, and 1-3 respectively. The bottom row contains a "Cancel" button (with a red circle and slash icon), the digit "0", and an "Enter" button (with a green checkmark icon).

Swipe MSR or Enter ID		
000120		←
7	8	9
4	5	6
1	2	3
Cancel	0	Enter

Figure 4-13

If the account number is not known, enter the number pre-printed on the paper Gift Certificate preceded by a semi-colon and succeeded by a question mark (the same number entered when the card was initially issued). For example, if the pre-printed Gift Certificate number is "147," enter ";147?" in the ID number field. Click the "Enter" button when done.

If the Gift Card has sufficient value to cover the check amount, the Change screen displays, indicating that there is no change due the customer (see Figure 4-14).



Figure 4-14

The receipt prints, and if there is any remaining balance on the gift certificate, a separate receipt prints that shows the remaining balance.

If the Gift Card does not have sufficient value to cover the check amount, the Settle Order screen reappears, showing the amount of the Gift Certificate as a tendered amount and the balance remaining.

For example, in Figure 4-15 below, the total order amount is \$110.22. A Gift Certificate with a remaining balance of \$95.76 is applied to the check. This is listed at the left of the screen. When deducted from the total due, the remaining balance is \$14.46. Choose another payment method to pay the remaining balance (it may be another Gift Certificate or any other payment method). As soon as sufficient payment has been tendered, the transaction completes and the receipt prints.

Settle Order - Ticket #: 12		
Cash	Check	Visa
Mastercard	American Express	Discover
Carte Blanche	Diner's Club	ATM / Debit Card
House Account	Gift Certificate	Complimentary
Even Amount Split		
Gift Certificate 95.76		
Total Due		\$110.22
Total Received		95.76
Balance		14.46

Figure 4-15

Note: Aldelo strongly recommends the use of MSR (Magnetic Stripe Reader) cards whenever the Gift Card Server feature of Aldelo® For Restaurants is used. Since the cards need only be swiped through the reader to capture their data, manual data entry is eliminated. Manual data entry is known to be an error prone process. The use of MSR Cards eliminates these data entry errors.

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